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ABSTRACT

These guidelines for college and university linkages abroad are intended primarily to help institutions not already extensively involved with institutions in other countries to develop formal academic contacts and agreements. The guidelines are designed to help start the process, facilitate follow through, and identify difficulties that can be avoided. Three types of linkage are distinguished : (1) friendship agreements without financial obligations; (2) program-specific links that may or may not include financial obligations; and (3) institutional linkages that commit the institution to broad-based programs and/or exchanges. The first chapter discusses basic planning considerations concerning administrative structure, leadership, funding, choice of region and country, and agreement type. The second chapter offers specific procedures for developing a linkage including: appraising institutional capacity; choosing a partner abroad; initiating formal contacts, negotiating, and constructing the formal agreement. Chapter 3 looks at other issues: finances; language; program quality comparisons; local laws and customs; announcing the program; and pre-departure preparation. Sample agreements for each linkage type, a list of useful publications, and lists of U.S. agencies and associations, U.S. government resources, and bi-national educational foundations and commissions are appended. (MSE)

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Guidelines for College and University Linkages Abroad

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Guidelines for College and University Linkages Abroad

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INTRODUCTION

The scope and magnitude of the transformation of the international system over the last few years has created new and exciting opportunities for international linkages. The old order has been irrevocably altered by the break-up of the Soviet Union, the end of the Cold War, the emergence of new democracies, the globalization of the international economy, and growing demands for participation and equality. These changes have potentially profound consequences for American colleges and universities. Whole areas once closed to us are now open; there is an eagerness and opportunity for interaction and collaboration that has not existed for decades in some countries; and more countries are open to American ideas and experiences. The suspicions of the Cold War have been replaced by the prospect of economic, political, and social development, and the United States is expected to play an important role. As the world's only remaining superpower, we are finding ourselves involved in the international arena in new ways. That, too, has potentially far-reaching consequences for American higher education.

The geopolitical changes of the last few years have increased the flow of international exchanges to some extent, but a quick review of the past few years suggests that many of our academic institutions have not kept pace with the changes or the opportunities. Robert H. Atwell, in his presidential address at ACE's 1992 Annual Meeting, said that he was "...struck by how little we as institutional leaders know about each other's institutions and systems of higher education; in contrast, the world of scholarship really knows no national boundaries. At a time when resources for higher education are diminished almost everywhere, and when our economies are ever more multinational, we should look for ways to help each other. But that help has to be based on the kind of understanding, respect, and trust that can develop only through face-to-face contact.... Such exchanges enlarge our vision of our own nation as well as others, and thereby enable us to better serve our institutions."

"Understanding," "respect," and "trust" are vital to successful international relations. One of the most effective ways to build them is through international linkages, which bring other

people and other cultures to life through direct interactions — face to face and idea to idea — both at home and abroad.

American colleges and universities have a national obligation to produce well-informed students who can play an intelligent role in international trade, diplomacy, development, business, and security, and who, as citizens, can understand the world around them. Linkages can play a major part in that effort by providing the base for long-term cooperation. Linkages can also improve the quality of specific departments, enhance research output, and contribute to a mutual understanding that extends far beyond the boundaries of the institutions involved.

The fundamental changes that have occurred in the international arena in recent years, and their implications for higher education, make this a good time to establish new linkages. This guide is designed to help with that process. While intended primarily for colleges and universities not yet extensively involved in linkages abroad, we have also tried to include material that might be useful to those who already have significant experience with exchanges.

This document is a revised and expanded version of the 1984 ACE publication, *Guidelines for College and University Linkages Abroad*. It was prepared in response to requests for information and assistance from U.S. higher education institutions interested in developing formal academic contacts with institutions in other countries. The guidelines have been kept simple to maximize their use by the greatest number of institutions possible. We have added material on potential problem areas and suggestions about how to avoid them.

These guidelines are designed to help start the process, outline procedures to follow, and identify difficulties that might be avoided. The document distinguishes among three types of linkages: 1) friendship agreements (without financial obligations); 2) program-specific links (e.g., libraries, internships, a language program), which may or may not have financial obligations; and 3) institutional linkages, which commit the college or university to broad-based programs and/or exchanges (e.g., faculty and student exchanges, joint research) and thereby carry financial obligations. These categories are further discussed later in the publication. We have included sample agreements for each category of linkage to give readers an idea of what some colleges and universities have done. These samples are merely illustrative; we make no representations regarding their appropriateness or legal sufficiency. Each institution should have its agreements reviewed by its own legal counsel.

For those institutions just beginning to develop international linkages, a word of caution is in order. A formal linkage with another institution requires significant preparation. International linkage agreements can consume a great deal of time and resources. It is easy to underestimate the potential complexities and expenses of international programs.

U.S. colleges and universities have sometimes been caught up in the enthusiasm of current events in considering new linkages. Ten years ago, China was the country of choice because it was newly opened to the West. Recently, Russia and Central and Eastern Europe took center stage; currently South Africa is in vogue; next year, it may be Japan or Mexico. Institutions should consider long-term institutional development interests, and not merely current events, as they consider potential partners.

Universities in many other countries report that they have spent enormous amounts of time and money in preliminary discussions with leaders of U.S. institutions, often with meager results. For instance, the rector of a prestigious university in Central Europe reported that during 1990-91, his university received an average of 50 foreign visitors a week, most of whom had good intentions but no concrete plans, and each of whom took up hours or days of faculty and administrators' time. Most of these visits did not result in agreements (in part because no sources of funding had been identified), and some did not even generate a follow-up letter from the American visitor. We are currently receiving similar reports from South African universities. In much of the Third World, the hospitality costs of foreign visitors strain already depleted budgets.

All of this suggests the need for thoughtful preparation and planning from the first moments of "consideration," through review and preparation, to the final signing of a formal linkage agreement. These guidelines are designed to help you think through that process in ways that will ensure success. In what follows, we pose questions for consideration and provide a step-by-step process that can be followed as you set up linkages abroad.

Chapter I

PLANNING INTERNATIONAL LINKAGES

Although this is a time of unparalleled opportunity for linkages abroad, the decision to make such a commitment requires careful consideration: Do international linkages make sense for this institution? Does the interest exist on campus to support these linkages? If it does not, could it be generated and sustained? What are the likely financial costs? How can sources of funding be found? What is the added value of an international linkage to our current educational experience? Are there other ways in which campus exposure to the international arena could be increased without extensive commitments or direct institutional involvement (e.g., the use of private exchange organizations or participation in linkage programs that are run by other colleges and universities)?

Each college and university will have to examine its own situation. What are the educational advantages? What are the disadvantages? How does each linkage complement the mission of the institution? What are the potential costs? Are people prepared to make the commitment? Is the institution willing and able to provide the necessary reciprocity?

The process of establishing and maintaining linkages requires a major institutional commitment. At the outset, the process also will involve some expenses, even if linkages become self-financing in the long run. Effective linkages involve collaboration; they should provide benefits to both parties. Most institutions have found that the linkages that work best are those that involve a high degree of mutuality. If your institution understands the nature of the commitment being made and is ready to proceed, there are a number of preliminary considerations to examine.

PRELIMINARY CONSIDERATIONS

Planning

The planning process involves working through a number of questions and policy issues (discussed later in more detail), such as: choice of site for the linkage, a cost and benefits review,

assessment of campus interest, determination of the nature and sources of financial support, development of the actual program, communication with the overseas partner, and preparation of an agreement. A thorough planning process will facilitate communication in the university community about the linkage and will encourage the broad participation of students, faculty, staff, and administrators.

Planning becomes expecially important when the linkage is dependent on outside funding. Grant writing and other fund raising efforts can add at least six months to institutional preparation time. For some funding agencies, proof of support from a potential college or university partner abroad may be required. In those cases, plans must be made far in advance of the grant deadline, since proof of that support usually entails communication, discussion, and possibly additional negotiations. There is a good deal of time involved in the grant process itself. For example, the United States Information Agency (USIA) application process for Citizen Exchange Awards starts in December and ends in July with announcement of awards for the next academic year. The United States Agency for International Development (AID), beginning in fall 1993, plans to release Request for Applications (RFA) for the University Development Linkage Project in September; "letters of intent" (which precede applications) will be due in November, with applications due in January. The annnouncement of grants is expected to be made in June or July for funding beginning October 1, 1994. A successful grant application almost invariably includes a well developed long-term plan and rationale as part of the submission. That, too, takes time to prepare. The whole process can take as long as two years from conception to the actual start of the linkage, although it can sometimes be done more quickly.

Administrative Structure

Most effective linkages are administered through a central office headed by a senior administrator. This person should have institution-wide authority and must be authorized to speak and negotiate for the institution (subject to the usual review and approval processes). Many of the administrative issues that relate to linkages will have campus-wide implications, whether linkages are focused on research, study, or faculty exchanges. Even linkages involving a single department or program will usually have an impact throughout the institution and may affect broad institutional policies. The kinds of policies that might be involved include: employee benefits (such as health care and sick leave), academic credit, grade equivalents, teaching loads for visitors, salary equivalents, tuition and fees, research clearance, access to campus facilities (libraries, computer networks, athletics), and availability of university housing.

Centralization of primary responsibility for linkages helps create a long-term record and memory about linkages, avoids duplication, helps prevent the establishment of unsustainable linkages, and builds up a pool of administration-based international expertise that is easily accessible to the campus's leadership, faculty, and students, its surrounding community, and international visitors. Such offices function as coordinating and facilitating bodies that monitor agreements, arrange clearances, provide briefings, and assist with contacts. For academic pro-

grams abroad, the office can assist with student preparation and briefings, coordinate programs, translate and record grades, and maintain regular contact with those in charge of the overseas programs. In some institutions, it may be desirable for some aspects of the programs to be run by those involved in individual projects or by departments that have close ties to the language and area of the program (e.g., a French department or an African studies program). Such decentralization can encourage responsibility for a program, create a sense of community for the participants, and help with recruitment. In such cases, the university office may function primarily to coordinate these activities. The key to long-term success is to ensure that all major decisions are centrally approved, even if some of the program administration is decentralized.

For linkages that are intended to have a university-wide impact, it is important to ensure that the programs are accessible to all eligible students and that they do not become the special purview of a single department and thereby exclude other potential participants. Many colleges and universities have noticed a significantly wider impact from their programs after making it clear that participation is not linked to membership in a specific department or college.

Lack of coordination can be extremely costly. When one American university recently decided to centralize its international programs, it discovered literally dozens of signed linkage agreements about which neither the chief executive officer nor the dean of international studies had been aware. Most of these agreements had major financial implications for the institution. Several were with the same institution (but made by different units, each totally unaware of the involvement of the others); many had never been implemented; still others were the subject of contentious debates abroad because of broken promises. Administrators, too, had made promises (sometimes unrecorded) that committed the university in a variety of ways. Total decentralization can result in high financial and legal costs, the potential for misunderstandings, and loss of good will.

Leadership

No matter at what level preliminary contacts are made, successful linkage programs require the full backing of the president or chancellor and all appropriate deans. A well informed chief executive officer ensures that there will be few surprises as planning progresses. His or her commitment will promote and sustain the support of key personnel among the school's administration and faculty, provide legitimacy to the contract negotiation process, and ensure an institutional climate that is receptive to linkages.

Linkage exploration and planning should be conducted under the direction of the senior administrator involved in international programs (e.g., a vice chancellor or dean for international studies and programs, or, in a smaller institution, the chief academic officer), with the help of a broad-based committee. This committee should include faculty members who have extensive international experience. Faculty acceptance and advocacy of international programs is crucial to sustaining linkages. Some universities require approval of all linkage agreements by the faculty senate or other appropriate faculty body. Staff, student, and administration representation also is

desirable. We recommend that this advisory committee review linkage agreements periodically, monitor the programs over time, and advise the administration about ongoing programs.

When a decision is made to establish a linkage, the president or chancellor need not — indeed, probably should not — conduct the contracting arrangements, but should leave the responsibility of its execution to an appropriate senior administrator. The actual signing of an agreement, on the other hand, often provides a fitting occasion for presidential involvement. Once the formal linkage is established, the responsibility for its administration should be delegated to the academic officer responsible for international activities.

Funding

Funding sources should be identified during preliminary program planning. Ideally, linkages should be feasible without outside financing, but this is not always possible. If outside assistance will become necessary, administrators must ensure that it is obtainable before they proceed beyond the planning stages. Those programs that are dependent on supplemental funding often have short lives. Certainly, total dependence on external funding will limit program growth and flexibility.

Most programs are more expensive during their first few years because of the need for more frequent travel, communication, publicity, and other start-up activities. In most cases, the more the program involves one-for-one exchanges of students that balance costs on both sides, the lower the cost to the institution. Some study abroad programs are run with no additional expense to the college or university and with only marginal participant costs (usually for transportation abroad) above what students would normally pay at the college or university.

Choice of Region and Country

The choice of geographic area(s) (and the country) in which the institution wishes to establish a linkage is of vital importance. The choice may be defined by existing conditions such as previously developed contacts, the institution's particular academic strengths, or the existence of a sister-city link. If it is not, a number of other factors should be considered when making a decision about where to establish a linkage: languages taught on campus, the relative strength of academic offerings that focus on various geographic areas, the demographics of the student population, international ties to the community, and local business and trade interests.

Over 75 percent of all current U.S. institutional linkages are with European colleges and universities. Many European institutions have ties to as many as a dozen American institutions. This means that most American students are missing important opportunities in other parts of the world. Linkages in Asia, Africa, and Latin America can provide especially exciting learning experiences and opportunities for changing the lives of students, staff, and faculty in profound and lasting ways. While linkages in some of these areas can be more difficult to organize, that is not always the case.

Types of Agreements

The nature and extent of the preparation required for linkage agreements will be determined in large part by the type of linkage selected: friendship, program-specific, or institutional. Many linkages start out as friendship agreements and progress no further. Others entail specific programmatic links (e.g., an HIV research project, a joint teaching effort in Japanese languages); still others are broad-based or institutional. We discuss each type of agreement in terms of the nature and extent of commitment it involves and its implications for the institution. Each involves an increasing degree of complexity and, therefore, more extensive preparation. (For sample agreements, see Appendix I.)

Friendship and cooperation

These agreements are intended to encourage cooperation and friendship between institutions, but make no financial commitments. They are often used when the presidents or chancellors of two institutions meet and wish to commemorate the occasion, express positive feelings toward each other's institution, and encourage mutual cooperation. Such agreements might be a first step toward a more detailed future agreement, or they may be the only step taken.

Some American presidents and chancellors sign such exchange agreements during trips abroad, often without first consulting with the faculty and administrators who will be affected by them. Because most such agreements have no concrete results, they may arouse resentment on the part of the prospective partners whose expectations they have raised. Friendship agreements can unwittingly commit institutions to substantial financial obligations. All of this suggests the need for careful preparation before entering into an agreement.

A "Memorandum of Understanding" can be a useful alternative when long-term planning and negotiations have not yet taken place. (See Appendix I.) Many presidents and chancellors carry copies of these memoranda (which often are beautifully printed and elaborately presented) when they travel abroad. Their importance should not be underestimated, since they protect travelers from the embarrassment of being presented with texts that might have other long-term implications. A Memorandum of Understanding attests to a successful meeting of representatives of the two institutions and expresses a desire to promote friendship and cooperation. At the same time, no promises have been made, so the door is open for future action — after careful consideration.

Program-specific links

These agreements refer to specific programs (e.g., a library materials exchange, an internship program, a cooperative research effort, a departmental student exchange). They are often initiated by faculty members and are frequently facilitated by personal links to faculty abroad. Many program-specific links do not involve financial commitments. Some include very limited expenses (e.g., mailing costs for library material exchanges). Some, like one-for-one direct student exchanges, involve relatively minor institutional expenses, but substantial amounts of bookkeeping and other administrative costs. Additional costs, such as international travel, can be

borne by participating students, although some financial assistance may be needed to broaden participation.

Program-specific linkages can, however, involve more significant expenses. Examples include summer language programs, internships, or study programs that are not direct exchanges. Even direct student exchanges can be costly if the countries involved have markedly different levels of economic well-being. For example, a Russian/English summer language program will require a subsidy; most Russian students cannot afford incidental expenses and have problems getting hard currency. American institutions may be expected to help with travel expenses and to provide a stipend to cover the cost of books and incidentals. One key to success is to spell out the obligations and responsibilities of both parties (e.g., that tuitions will be exchanged on a one-for-one basis, that each institution will provide access to laboratory facilities, that the host institution will furnish room and board) as clearly and precisely as possible.

Broad institutional linkages

These agreements set the terms (e.g., responsibility for fees, credits, housing, visa assistance) for broad cooperation between two institutions. Agreements usually spell out a range of conditions, expectations, and obligations for participating faculty, undergraduates, and graduate stu-dents. They also symbolize a special relationship between the participating institutions as a whole. The linkage may include faculty status for visiting faculty, equal access to courses for participating students, or use of facilities on a space-available basis. It is important that the mean-ing of such conditions as "faculty status" or equal student "access" be clearly spelled out. Does faculty status include an office, access to research funds, special library privileges, etc.? Will enough courses be open to exchange students each year to warrant a student exchange? If not, what are the alternatives? For student exchanges, the institutions may need to monitor many aspects of the process to ensure that both sides are protected (e.g., offsetting tuition, room, and board).

Broad institutional linkages may provide opportunities for both undergraduate and graduate student exchanges. It is important to realize the very different implications of these exchanges for most institutions. Undergraduate exchanges usually do not require admittance by the receiving university, as long as requirements of the sending institution are met. They usually require a specific grade point average (often 3.0) and an appropriate level of language competence. At the graduate level, participation almost always involves admission by the receiving institution, as well as permission from the sending institution. This is partly because graduate programs are smaller and involve more extensive faculty contact; partly because of space requirements for labs, computing, and research centers; and partly because of the very personal nature of graduate study.

Where large numbers of people are participating, institutional agreements may include provisions for special advisors, summer language programs, office space for program administrators, and sometimes even housing for participants.

Chapter II

DEVELOPING LINKAGES

If the linkage envisioned is one of friendship and cooperation (type 1 in the preceding section), the preliminary steps discussed earlier probably suffice for preparation. If the linkage is program-specific, the following steps should be taken.

STEP 1: APPRAISING INSTITUTIONAL CAPACITY

It is helpful to start by developing the rationale for a linkage, especially if the institution intends to apply for AID or USIA support or to carry out other fund-raising activities. A rationale that is rooted in the overall mission and purpose of the institution is likely to be the most effective. Both the USIA's University Affiliations Program and its Citizen Exchange Program, as well as the AID University Development Linkages Program (UDLP), require a substantive rationale and a long-term focus. The goals of the linkage program should be detailed enough to make a strong case for external support, and they need to answer the questions: Why should the taxpayers (a foundation, a donor, or alumni) provide funding for this project? In what ways does the linkage serve the national interest? What does it add to the training of students or to our knowledge of the international arena? How is it tied to institutional teaching, research, and service mandates? These questions must be answered in a powerful, unambiguous way.

Too often, the appeal of developing a formal linkage program obscures the operational realities that must be addressed when the program is launched. However compelling the impetus to create international linkages, it may not translate into institutional capacity to develop and sustain linkages. Leaders who are considering a linkage need to critically assess the proposed program's impact on the institution's mission, resources, and finances.

Once a decision has been made to proceed with either a broad institutional or a program-specific linkage, a number of questions should be addressed by the responsible campus administrator and the advisory committee. It is useful to start by taking an inventory of institutional resources that are germane to international activities. This task includes:

- compiling data on existing faculty resources;
- assessing program support units including the library, study abroad capabilities, laboratories, special community outreach efforts including practical training and/or internships, host families, counseling, and related support services for international students;
- reviewing the curriculum to see what is currently offered and what the potential is to internationalize existing courses and establish new majors or minors;
- appraising interest in the linkage on campus and its viability over several years; and
- assessing potential sources of financial support for the linkage.

With a clear picture of campus resources, the institution can begin to look at the following questions:

- How does this linkage program support the overall mission of the institution?
- Do the institution's current international efforts reinforce the goals of the proposed linkage?
- How would this linkage program assist with the institution's overall internationalization?
- Does this linkage fill any gaps in existing programs?
- Are there faculty with special area interests, research, or training projects abroad who can serve as liaisons?
- Are faculty and administrators sensitive to cultural differences that might affect the establishment and operation of a formal linkage program?
- Why should a foreign institution consider a formal linkage with the institution?
- Which of the institution's resources could be used to support and leverage a formal linkage to a foreign institution: area and language studies programs, business internships, international development and research activities, special library collections, research facilities, training opportunities, assistantships, technical assistance programs, outstanding faculty?
- Are there sufficient internal financial resources to set up the linkage program? Are there sufficient internal financial resources to maintain the linkage program over the long term? Are there sufficient financial resources for funding special facilities and/or services that might be required by the linkage?
- Is there a strong commitment to a linkage program and is there adequate understanding of its implications, risks, and opportunities?

- Are foreign language programs adequate to provide training for staff and students participating in linkage activities which require language facility? What English language programs are in place to assist international participants?
- Do other U.S. institutions have linkages to institutions in the same geographic area? Are there possibilities for multi-institutional collaborative relationships? Will the benefits of pooling knowledge and resources and sharing risks and costs outweigh the pitfalls of bringing another institution into the planning and negotiating process?
- Are there local business or other community resources that might be useful for linkages in general? For linkages in specific geographic areas?
- Is there a good knowledge base about the culture, politics, economy, and academic systems of the host country? If not, how could the existing knowledge base be strengthened?

The answers to these questions will help inform the remaining steps in the development process.

Step 2: Choosing A Partner Abroad

If the institution has already identified a partner, skip to step 3. If not, the institution must review its options and assess the relative merits of each. Once a commitment has been made, it is difficult to change without engendering both hard feelings and legal problems.

After selecting an area of the world (Africa, Asia, Europe, the Middle East, Latin America) in which to seek a linkage partner, the next task is to choose a country and a college or university for the linkage.

Find out about the higher education system in the proposed country. Resource materials are available for consultation. The American Association of Collegiate Registrars and Admissions Officers (AACRAO), for example, publishes the World Education Series; each volume contains a national overview supported by detailed descriptions of the educational system. Multinational organizations such as The World Bank and UNESCO have also published a number of studies of higher education (See Appendix II). U.S.-based area studies groups and foreign language associations can also supply information. The Trans Regional Academic Mobility and Credential Evaluation Information Network (TRACE), a computerized information network on higher education around the world that includes data on individual institutions, can be consulted through The College Board's Office of International Education. Excellent reports are produced by The Economist Intelligence Unit as well. At later stages of the inquiry (once a country has been chosen), desk officers at USIA, the Department of State, and AID can provide country-specific information. Other useful sources include:

- Associations and international organizations such as the International Association of Universities (IAU), which can provide general information,[1] and groups such as the International Council of Scientific Unions, the International Social Science Council, and the Food and Agriculture Organization of the United Nations, which can provide more subject-specific information;
- other colleges and universities which have established linkage programs abroad in that area or with that institution;
- the cultural attaches in the embassy of the target institution or, if there is none, the ambassador.

A list of other information-rich organizations in the United States and abroad is included in Appendix III.

If the institution does not have a candidate for the linkage, ask faculty members about their links to institutions in the geographic area of choice. Administrators are often surprised at the wealth of experience existing on their campuses. Even if a particular faculty member is not interested in taking a major role in the linkage, he or she may be able to provide valuable information and useful contacts for those who are working on possible linkages. If faculty contacts do not prove helpful, explore possibilities among the institution's staff, administration, alumni, trustees, and community members. Or, contact the most appropriate associations listed in Appendix III. Remember that while these organizations do not generally serve as brokers or clearinghouses, they may have information on particular institutions or resources.

Informal contacts set the stage for formal contact with the proposed linkage partner and can help the institution obtain the information needed to choose a partner institution. Faculty, alumni, or representatives of community groups traveling abroad may be used to discuss the linkage idea with colleagues at the proposed institution. These contacts are a good way of learning about the potential partner institution's experience with linkage programs.

It is sometimes desirable to send an administrator to visit potential partner institutions. Prior to sending someone, it is important to write, telephone, or fax the appropriate senior official (usually the rector or vice chancellor) for an appointment. Otherwise, the representative may be shifted to individuals who do not speak for the institution. The representative should carry a letter of introduction. A sample "Letter of Introduction" is included in Appendix I.

It is important that representatives also take along material about their own institutions to exchange with prospective partners. It is especially important to include information that highlights what the institution can offer the overseas partner. It also is useful to include information about U.S. higher education for those who are unfamiliar with our system. Information on U.S. higher education, such as ACE's *International Visitor's Guide to U.S. Higher Education*,[2] can

[1] The International Association of Universities (IAU) is setting up a computer bulletin board for college and university inquiries about institutions seeking linkage partners.

[2] ACE's *An International Visitor's Guide to U.S. Higher Education* is available from ACE for $10.00.

help the proposed linkage partner understand the basic structure of higher education and the governance and administration of institutions in the United States. If a representative does not visit the potential partner, such information should be mailed.

Whether the linkage is project-specific or a broad institutional linkage, there are some general issues to consider as the institution reviews its options:

- The advantages of this agreement for the proposed partner. Does the institution have something to offer that will be attractive to the proposed partner, that will complement its program, meet some of its needs, or offset any of the costs or inconvenience associated with a linkage?
- The reputation of the potential partner. Is there anything to suggest that problems will arise or that requires caution and further checking before an agreement is signed?
- The potential partner's capabilities for managing this program. Does the institution have necessary staff and expertise?
- The enthusiasm of the potential partner. While passive agreement may be sufficient for some projects, a lack of enthusiasm can spell disaster in the long run. An eager partner, on the other hand, can often overcome even the most daunting of problems and will work to make the daily life of participants productive and enjoyable.
- The availability of adequate housing (on the campus or in the community) for the faculty, students, and/or staff involved.
- The need for special permits or other documentation. Some countries have formal requirements for research clearance, visas, the importation of personal computers (even temporarily), or research equipment. Most colleges and universities abroad can provide information about the requirements and assist in obtaining necessary clearances. Information about visa requirements can be obtained from embassies in the United States.
- The need for an adequate financial base, if any budget commitment is expected of the partner institution.

Following are considerations related to project-specific linkages. For broad institutional linkages, skip to section 2b.

a. Project-specific Linkages:

The choice of both a country and a partner for a project-specific linkage may be determined by the project itself. Research linkages will be limited by facilities, the research climate, access, the availability of trained personnel, etc. Language programs will be defined by the language desired, though there will be some latitude in selecting a particular college or university. Internships will depend on the availability of appropriate organizations and institutions that are willing

to accept foreign students. Where project concerns are not restrictive, the choice can be guided by institutional priorities and needs. For example, if the institution runs a strong South Asian program but lacks advanced language instruction, a summer intensive language program might be set up at an Indian college or university. If the botany faculty need tropical field experience, a project might be arranged with the University of Costa Rica botany department that would allow the Costa Rica faculty to use the institution's advanced equipment during the summer break.

In addition to their highly focused purpose, program-specific linkage arrangements are often cost-effective because there are campus constituencies that are receptive to the program opportunities. Project-specific linkages may make it possible to limit travel and coordinating expenses. For example: a particular department supports the development of a business internship program in France. The faculty at both institutions make the arrangements, with the help of business connections in the United States and France; students cover their own travel costs and are paid a small stipend by the host firm to cover living costs. The French institution's business school sends an equal number of students for summer internships in American businesses. In another case, the need to interact with colleagues in other countries results in faculty-developed collaborative research projects. These result in joint grant funding. The project takes place without any university assistance beyond administration and coordination. In still another example, the desire of medical faculty to meet their colleagues abroad to exchange ideas and to keep up with professional activities fosters a cooperative faculty workshop with a university in Japan. A grant from each university covers the cost of travel for five faculty, the venue alternates between the two campuses each year, and participating faculty host visitors in their homes. Both institutions gain at very little cost.

The focused nature of these kinds of linkage agreements makes the preparation less complex than for broad institutional agreements. Nonetheless, a number of issues should be examined and great care should be exercised to ensure that obligations and responsibilities are clear. Among the areas to be examined are:

- The appropriateness of the partner institution for the specific project envisioned.
- The availability of essential personnel and facilities (at home or abroad) at the time the project is to take place. While many institutions have the necessary personnel and facilities (labs, equipment, vehicles), they may not be available when needed by those involved in the project abroad.
- The commitment of those who suggested the linkage and their ability to raise or provide the necessary funding.
- Whether or not there is broad support within the unit for the project, especially if its cost could limit the unit's access to other resources.
- The availability of able leadership within the unit to build and maintain cooperation with their counterparts overseas and to sustain the program over time.
- The administrative skills of the individuals involved and the kind of assistance they will need to help the project reach fruition. Some of the most enthusiastic interna-

tional entrepreneurs end up leaving the institution. Others build projects that become self-sustaining or grow into broad-based institutional linkages that profoundly affect both institutions.

b. Broad-based Institutional Linkages:

Institutional linkages, especially those involving multiple student exchanges or study abroad programs, require more extensive preparation. It is useful to look at more than one college or university before making a final selection. The institution can develop a potential partner profile by examining the following questions:

- What is the academic quality of the proposed linkage partner?
- What are the institution's strongest areas?
- What are its weakest areas? Will they pose problems?
- What services are provided by the institution?
- Does the institution have experience with international linkages? Have other American institutions been involved in general institutional linkages with this institution? If possible, contact officials at these institutions and find out if they have found the linkage to be fruitful and generally problem free.
- Will the institution meet participant needs and expectations?
- What is the nature of the administrative arrangements for institutional linkages at the potential host institution? Is there a single office that oversees linkages? Does it seem to be prepared for the additional responsibilities this linkage will entail? Is communication with responsible officials relatively easy by telephone, fax, or mail? If not, is the communication capability adequate? Does the institution seem prepared to respond to emergencies?

In assessing the compatibility of potential linkage partners after they have been identified:

- Rank order the choices (privately). It is wise to have several linkage choices in case the first choice does not prove feasible. It is also important to have a back-up institution and site in the event that natural disaster or civil strife requires a change in venue.
- Learn whether the potential partners have ties with other U.S. institutions. Will that affect this program? Consider whether cooperation or a consortium would be useful. If so, explore the idea.
- Review each potential partner in terms of programs, faculty, student body composition, location (urban or rural), health services, etc. Assess the choices in terms of their overall quality.

- To the extent possible from a distance, assess the adequacy of each institution's academic facilities, classrooms, laboratories, studios, practice rooms, etc., keeping in mind that institutions in developing countries generally will not have the kinds of facilities that U.S. institutions do. Review provisions made for using books and other learning aids, including access to libraries and other research collections. Will students need to bring books?
- Clarify whether there are arrangements for academic and personal advising and other support services for students and faculty. Many universities in Europe and elsewhere, for instance, do not provide housing or extracurricular programs for students. Can any special programs be arranged to help develop cross-cultural understanding?

An important area of consideration for some institutions is whether the proposed linkage institution is accredited or officially recognized. The term "accreditation," as used in the United States, loosely implies peer-approved academic status for an institution. Accreditation is a uniquely American process. For most colleges and universities abroad, official approval from the Ministry of Education (or another appropriate ministry) ensures a similar legal status and means the institution is an officially recognized, degree-granting postsecondary institution. While there may be no direct relationship between ministry approval and the quality of programs established through the formal linkage agreement, all parties to the agreement must be comfortable with, and knowledgeable about, the legal status of each institution involved in the linkage. Confirmation of such status can be obtained through the country's Ministry of Education or through the Cultural/ Educational offices of its embassies.

Step 3: Initial Formal Contacts

Once a decision is made to proceed, a letter from the president or chancellor of the proposing institution should be sent inviting the selected institution to consider becoming a partner in a formal linkage agreement. The letter should include:

- A rationale for the formal linkage and a clearly articulated discussion of potential advantages to both institutions;
- Strengths of the proposing institution, and comments about how they complement specific interests of the proposed partner institution;
- Evidence of appropriate resources on campus (academic, administrative, physical, and financial) to support the linkage commitment;
- Proposed responsibilities for each linkage partner in terms of academic, financial, administrative, and physical organization of the linkage;

- An indication of how program costs would be met;
- A suggested procedure for implementing the linkage agreement;
- Evidence of interest in an exchange of on-site visits and future joint negotiations;
- A suggested time-frame for the linkage planning process. The recipient must be given ample time to consult with appropriate people or offices, and to draft an informed response. Given the vagaries caused by distance and communications difficulties, the initial inquiry should be followed up by a phone call or fax after two or three weeks.

Step 4: The Negotiating Process

The parameters of the negotiation should be planned before a formal on-site visit takes place. This includes a general understanding of the aims and focus of areas in which there might be disagreement, and a range of possible solutions.

Broad preparation for the negotiation phase of the process on both campuses is essential. While the chief executive officers should be involved or at least informed, the persons in both institutions who eventually will have responsibility for the operation and continuity of the program should oversee the negotiations. Academic department heads or deans of faculties, as well as faculty members who might participate in initial linkage programs, should be included in discussions. Student affairs and foreign student officers should also be included. The business officers and legal staff of both institutions should review and discuss proposed agreements.

The various steps within this process include:

- Specification of mutual program goals. These should be clear enough to be subject to review and evaluation.
- Plans for the implementation of these goals. These should include agreement on the following (where appropriate):

    1. which departments (divisions, faculties) will participate, the degree of involvement of other programs, and curricular adjustments needed to accommodate the linkage;
    2. the minimum/maximum number of faculty and/or students to be involved in the program (initially, annually, or for a specified period thereafter);
    3. provision for payment of faculty salaries and benefits, housing, transportation, arrangements for spouses/families, replacement of faculty members who will be abroad, and any change in faculty status which would occur as a result of an overseas appointment (i.e., rewarding the period abroad in the promotion, tenure, and salary system);

4. student admission requirements, record keeping, and transcript arrangements;
5. grading and grade transfers from the overseas institution to a U.S. format and vice versa. The process and translation system should be agreed on in advance. Do not assume that similar looking letter or numerical grades are similar. For instance, in some institutions abroad, only one or two "A's" are given and no scores can be higher than 85 percent. Students should receive grades that reflect the practice of their home institution so that their period of study abroad does not appear to reflect a lower level of performance (unless they do poorly in the program);
6. credits per course and comparability of requirements for degrees at the home institution;
7. student tuition, housing, board, health services, intersession housing, and cultural opportunities;
8. level of language proficiency required for participation (at both institutions), means of evaluating that proficiency (TOEFL, proficiency testing, etc.), and provision for acquiring or improving language proficiency;
9. orientation and debriefing of visiting faculty and students;
10. academic calendars (semesters, quarters, time of year), and special programs (short- or long-term training, research);
11. faculty and student access to facilities and services (laboratory equipment, computers, secretarial services, etc.);
12. faculty status and its privileges;
13. administrative and space arrangements for the program; and
14. community outreach and related off-campus cross-cultural opportunities.

- A statement that any agreement eventually reached would be formalized in writing and signed by both parties.
- Establishment of financial parameters applicable throughout the linkage, including:

1. payment and foreign exchange provisions for all currency transactions;
2. possibilities for "in-kind" support as well as direct financial payments;
3. provisions for regular accounting and auditing of funds; and
4. banking facilities to be used and their cost and availability to participants.

- Plans for regular mutual review and evaluation of the program.
- Establishment of communications linkages, including computer networks such as BITNET and INTERNET and fax transmitting and receiving equipment.
- Establishment of operational responsibility (including specific areas of accountability), and delegation of these areas to specific personnel at each institution (including information on released time for each individual to carry out these responsibilities).

- The status of any administrators involved in the program abroad and their rights and privileges at the institution they are visiting.
- Consultation with legal counsel and development of terms of desirable contracts, written agreements, and/or letters of understanding and procedures for the negotiation process and future dealings.
- Plans for on-site visits.

Not all of these items need to be spelled out in a draft agreement, since some (e.g., faculty and staff salaries and benefits) vary by the person and the year, and others are relevant only to one institution. Nonetheless, it is important that there be a general understanding of all issues affected by the linkage. The draft agreement should be circulated to the cooperating institution for its comments. General agreement should be reached well before a formal signing date is set.

Step 5: The Formal Agreement

A written document—preferably both in English and in the language of the partner institution abroad—should be signed and exchanged by the presidents or appropriately delegated senior administrators from both participating institutions. The initial agreement should specify a time for the program's first review and evaluation (e.g., two years). Conditions for withdrawal and requirements for written notification about intent to withdraw from the agreement (e.g., six months notice) should also be specified, as should provisions for modification of the agreement (by mutual consent). Many institutions find it useful to limit agreements to five years, with appropriate language allowing for extension or renewal by mutual consent. The nature of the relationship and the terms of the agreement should be reviewed by legal counsel.

The On-site Visits

In the best of all possible worlds, on-site visits (in both directions if an exchange is involved) could be a two-stage process. The first visit could be an exploratory trip taken by an advance team that includes one or two members of the planning group, though not necessarily the chief executive officer. It would be conducted after initial formal contacts have been successfully concluded by both proposing and proposed institutions (Step 3), and many of the negotiating considerations in Step 4 have been resolved. The first visit would examine the following:

- academic program: classroom facilities, mechanics of registration and withdrawal, libraries, laboratories, academic credit, offices, faculty credentials, language of instruction, resources for special study and research;

- administrative support: administrative personnel, transportation costs, living arrangements, office equipment, communications, operational expenses, banking and money transfers, types and schedules of payment for local services;
- students and student life: room and board, transportation, off-campus programs, access for physically disabled participants, clothing needs, medical support, athletics opportunities;
- culture and quality of life: political stability and openness, student/faculty perceptions of and interest in the linkage, cultural opportunities, bureaucracies (local government, ministries, police, university, customs, post office, telephones).

The aim of this visit is to work out details of the agreement, allow officials to become familiar with the institutions, and help campus leaders get to know each other. Both institutions should be far along into the negotiating process. It should be recognized that for the proposed linkage partner, the efforts involved in setting up the on-site visit are as expensive and time-consuming as the trip abroad is for the advance team.

In some countries, formal meetings with senior officials, courtesy calls during visits to the campus, and the ceremonial exchange of tokens of appreciation (the college or university seal, a quality book with pictures of the campus, a boxed pen with the campus logo), are expected signs of courtesy and respect. In many instances, these are formal meetings with appropriate brief speeches of appreciation and good will. Americans tend to be less formal about such contacts and may plan to skip "courtesy calls," but their importance should not be underestimated. Their cost is small, and they may open new doors and create new friendships.

In a mutual exchange, a return visit should be expected from the partner institution. Care should be taken to ensure that no more hospitality is received on the initial site visit than can be extended to the partner institution's team. A great deal of unhappiness has been created by American visitors being willing to accept accommodations and meals abroad but unwilling to reciprocate in the United States (because of either budgetary or legal restraints). If the institution cannot reciprocate, it should pay its own way abroad.

Ideally, the chief executive officer or appropriate senior administrators of both institutions should sign a formal linkage agreement during a second visit. However, a second visit is not necessarily essential and can be prohibitively expensive. A large majority of the issues relating to a linkage can be dealt with by phone, fax, and mail. The rest could be resolved during a single visit. While formal signing ceremonies are an excellent way to publicize a linkage and to build good will, they can be left to a later date, during travel for review of the project or assessment of student progress.

Legal Considerations

The laws and bureaucracies of the country of the proposed linkage partner can be complex and confusing. Prior to signing any formal agreement or contract, it is essential to learn about the

applicable legal practices of the host country. All parties to the linkage program should have reached the same understandings concerning all factors of the linkage agreement. All considerations affecting the operation of the linkage should be in writing. Legal areas of review would include:

- visa and entry requirements (and possible institutional assistance)
- taxes and fees
- personal conduct and social mores (drugs, alcohol, sexual relations)
- contracts
- legal liability (i.e., health and accident insurance)
- provisions for changes in content of the linkage
- employment laws and restrictions (including those for spouses)
- provisions for changes in currency exchange rates
- provisions for emergency situations within the institution (i.e., strikes, delays in receiving funds or services) or off campus (e.g., civil strife), or conflicts involving individual students or faculty.

In drawing up the final agreement, each institution needs legal counsel, particularly if the agreement involves substantial financial commitments. The proposing institution needs to ensure that the host linkage institution is legally empowered to enter into a binding contract.

The Document

Although consulting legal counsel is advisable, a statement or brief paragraph on each of the applicable items mentioned below should suffice for the formal agreement. There will undoubtedly be annual fluctuations in the numbers of participants, for example, as well as periodic changes in the financial terms of the linkage. It is often advantageous to avoid excessive detail in the document. By stating details in broad terms, institutions may be able to avoid frequent revisions of the document; keep in mind, however, that questions may arise on points that have not been addressed in detail, and may lead to disputes between the parties.

The document should include:

- a statement of mutual goals;
- the name, address, telephone, and fax number of the contact person responsible for the administration of the program at each institution;
- expected levels of participation (for students, faculty, and other individuals for occasional special projects);

- financial responsibilities of each institution, for program as well as administrative costs, method of currency evaluation, and management and accounting of the money;
- effective date and duration of the trial period;
- provisions for periodic review or evaluation;
- provisions for changing the scope of the program; and
- a release clause with a specified time period between notice and withdrawal from the program.

The agreement should be drawn up well in advance of the proposed effective date, since either partner may wish to make final revisions after consulting with key persons on their own campuses or with their institution's governing body. The official and final version of the agreement should be written in both English and the primary language of the linkage partner. It is important to allow sufficient time to verify the translation. The importance of checking translations carefully cannot be over-emphasized. One institution found that a translation error in the non-English version doubled its financial liability.

Needless to say, the above discussion is not intended as legal advice and should not be relied upon as such. We merely want to note some of the relevant considerations, which should in turn be reviewed thoroughly with the institution's attorneys.

Chapter III

OTHER CONSIDERATIONS

Many other issues and concerns should be addressed in the process of setting up a linkage. Some of the more important are listed here. They include issues of finances, language competency, quality, local laws and customs, orientation, program announcements, and other practical details.

Finances

Inflation and fluctuations in currency exchange rates can pose obstacles to program planning. International financial transactions should be minimized. Reciprocal exchange of services between the two institutions, for example, reduces the number of currency exchanges. Student exchanges are easier to organize when both institutions (and countries) are at about the same economic level. In such cases, although the methods of financing higher education may differ, careful preparation of agreements can ensure equitable cost sharing between the participating institutions.

A reserve fund to cover exchange rate decreases should be maintained. Tuition fees for study abroad programs should be paid in advance or arrangements made for advance payment or automatic transfers from scholarships or trust accounts. A number of colleges and universities have had major problems with students who fail to keep up with fee payments during the course of an exchange program. Participants should be given estimates of incidental expenses (minimum, average, and generous) and should be required to bring at least the minimal amount. Institutions should consider medical coverage in calculating the cost of their programs.

The availability and cost of banking services vary a great deal. In some countries, certain types of transactions are subject to very high service charges. Be sure to check out the banking system and its requirements, as well as the services provided by banks at or near the college or university. Arrangements can often be made in advance that will allow easy (and cheaper) transfers from bank branches in the United States, or banks that have correspondence arrange-

ments can be used. It is sometimes possible to make arrangements in advance to deposit personal checks abroad. Some countries (including the United States) restrict the amount of hard currency that can be brought into or out of the country.

Language

Where the language for teaching and lecturing is not the same in both countries, the participating institutions should develop a language policy for the linkage. Where the focus of the exchange is research, the policy might be to encourage and assist with language training. The need for communications skills in the language of the country may vary from department to department (e.g., programs in the humanities may require greater proficiency in the foreign language than programs in the sciences), but, as necessary, faculty and students should have the opportunity to learn or sharpen their language skills. In some countries, the language of instruction abroad might be unavailable at the home institution (e.g., Hungarian, Russian, Arabic). Establishing summer language programs on campus might help, but a short-term intensive program will not be enough for beginning students to develop proficiency in a foreign language. Some study abroad programs in non-English speaking countries are taught in English. While not as desirable as total immersion in the language, they often provide valuable international experience and they offer further language training during the student's stay in the host country. Even in parts of Africa and Asia, where classes are taught in English, Portuguese, or French, students can benefit from instruction in indigenous languages (e.g., Hindi, Hausa, Swahili), thereby gaining access to the vast majority of the population outside the university and capital who do not speak the language of instruction.

Program Quality Comparisons

Institutional linkages frequently imply judgments about the comparative quality of instruction and curriculum at the two institutions. For example, in a study abroad setting, the American institution gives credit for coursework at university "x" in country "x" as if it were a course at its own institution. The institution is asserting that a French or History course at the institution abroad is the equivalent of a similar course at home, or that the course plus the "international experience" is the equivalent of a course at the home institution. It is important to recognize these assumptions because they can become contentious issues if not carefully thought through and agreed upon in advance.

Local Laws and Customs

It is increasingly critical that officials and participants recognize the importance of local customs and local laws. Far too many participants have found that violation of local laws, norms, and customs can have very serious consequences. Laws, customs, and norms about the use of drugs

and alcohol, dating, sexual relations, and religion are often very different from those in the United States. Penalties for marijuana use, for example, often seem extreme by American standards and can lead to long jail terms. In some countries, interaction between the sexes is very restricted. Views about modesty differ from place to place, as do expectations about communication between people of different ages and status. It is essential that participants understand that they are bound by the laws of the host country. No university official or embassy employee can protect them from the full force of the local laws if they are caught violating them. It is equally important to understand local norms and customs and the implications of violating them. Many countries have expectations about attire that are much different from our own. To violate those norms is to demonstrate disrespect. In some cases, it can cause serious incidents. That does not mean that participants should demean themselves if local customs are racist, sexist, or personally humiliating. But, it is equally unrealistic to expect to gain respect and understanding by insisting that the only viable norms are our own. If local norms and customs prove too arduous or disruptive, college and university officials should consider other venues. On the other hand, part of understanding others is to recognize and respect the important aspects of their heritage and culture, even when we differ about some of their values.

Announcing the Program

Signing a linkage agreement can herald the start of a campus-wide campaign to stimulate interest and involvement in the new international linkage program. Without extensive publicity on and off campus, there is no guarantee that information about opportunities abroad will reach intended audiences.

Announcement of the linkage program should contain as much specific information as possible. Written announcements can be sent to the local media, appropriate higher education associations (as an article for publication in newsletters), alumni, corporate and civic leaders, institutional benefactors, governing boards, and any other people or organizations connected with the institution.

Brochures describing the program might be made available to recruiters and admissions officers. Particularly with a new program, a one-page information sheet could be distributed widely on campus as soon as the linkage agreement has been signed. Essential information should include program dates, location abroad, current and proposed fields of study, opportunities for students and faculty, program costs, and a campus contact person or office.

It is useful to make a special effort to contact representatives of local groups from the country of the linkage partner. As the program becomes operational, these groups can play an active support role in many aspects of the linkage program, and they can serve as an invaluable community resource for participants. For student exchanges, internships, and study abroad programs, an open meeting should be held well in advance of the deadline for applications. The meeting might include a description of the program, eligibility requirements (including language competency), duration, cost, and other general information. It is especially helpful to have

students or faculty who have had such experiences talk about them. Someone with experience in the target country can help answer questions.

Special efforts should be made to recruit minorities and other students who do not often apply for study abroad. Scholarship support, for example, may enable them to participate. Some colleges and universities have found that a disproportionately high percentage of participants are women and humanities majors. Encourage minority students, those in the sciences, and male students to take part—it's an opportunity they have been missing.

Prior to Departure

Prior to participant departure, the following steps should be taken:

- Prepare a comprehensive orientation program for participants. This preparation is very helpful to students and faculty going abroad. Some institutions offer language courses and relevant area studies courses in the summer or semester preceding a study abroad program.
- Check on the possibility of reduced air fares for groups or educational institutions. Getting tickets early can can result in big savings.
- Prepare and distribute reading lists about the country and material about the host institution. This gives participants a better idea of the living conditions and can help them avoid culture shock. Some participants (including faculty) will have an adjustment problem. Unprepared students have refused to get off the plane, or have returned from places as similar to the United States as England after only a few days abroad.
- Inform participants and their families about emergency numbers and procedures. Have emergency plans in place to deal with civil strife, serious illness, psychological problems, or accidents. Urge participants to keep in close touch with their families. Many emergency calls to U.S. embassies abroad come from worried parents or spouses where a letter from the participant (who knows that he or she is fine) would have prevented a problem.
- Keep in regular contact with the partner institution. Notify administrators of arrival dates and times, even if they are not meeting your students or faculty. Make sure that housing and other facilities will be ready when participants arrive. It is worthwhile having someone meet exchange students (even if they must be paid), unless the students are accompanied by faculty or staff. This ensures that if there are problems with visas, transportation, baggage, or accommodations, they can be dealt with on the spot. The small expense involved may make the difference between a very successful program and a disaster.
- Make arrangements for someone to give participants a tour of the campus and the surrounding area. Many universities abroad have such tours already set up. Ask them

to include the important sights, but also good places to eat, theaters, laundromats, shopping areas, and so on. Ask them to discuss conditions in the area that will help make the participants street-wise. Should some places be avoided at night? Can women travel alone? Is petty theft a problem? Where are Americans most welcome? Where do students hang out? Are there faculty or student restaurants?

- Consider having participants (especially if they are students) travel together to the host institution. They can go home alone. There are too many horror stories of "missing persons" resulting from ad hoc travel arrangements. It is very difficult to find a student who does not show up on the first day of classes in Calcutta, Cape Town, or Paris.
- Make arrangements to periodically send copies of the campus newspaper and/or other items to participants. Some institutions send a monthly newsletter to all faculty and students abroad. It is greatly appreciated.
- For students abroad, make arrangements to meet their special registration needs for the next term at home.
- Be sure that someone is in regular contact with participants and can inform the home institution if problems are developing or if there are special needs. If the numbers warrant it, have a senior campus official or relevant faculty member visit the participants at least once during their stay. Regular contact with students, staff, and faculty (if only by phone, fax or mail) can be important to a successful experience for everyone.

Chapter IV

CONCLUSION

The possibilities for major new intellectual and personal experiences in the international arena have grown exponentially in recent years. With that growth come opportunities and challenges for American higher education. We hope that this material will be helpful as your college or university evaluates the possibilities of linkages with institutions of higher education abroad. If you have any suggestions for changes or additions to these *Guidelines*, we would appreciate your sharing them with us. We hope that the complexities and challenges noted here have not discouraged you, but rather have called your attention to issues and helped you to deal with problems which might limit the success of an otherwise rewarding experience. Enhancing international opportunities on our college and university campuses is one of the best ways we can help our students, faculty, and nation prepare for the new tasks and challenges that await us. We wish you great success on your journey.

APPENDIX I

A. SAMPLE MEMO OF UNDERSTANDING

Memorandum of Understanding between
The University of Great Expectations (U.G.E.), Washington, DC, USA
and
The College of South Asia (C.S.A., Calcutta, India

This Memorandum of Understanding between the College of South Asia (C.S.A.) and the University of Great Expectations (U.G.E.) reflects general consensus resulting from meetings between the leaders of these institutions.

We, the undersigned, have met in the spirit of international understanding and goodwill to examine the possibilities for enhancing educational and research cooperation for our students, staff, and faculty.

Following very fruitful discussions between us, we agree to explore these goals at our respective institutions over the next few months.

While no commitments have been made by us binding our institutions, we sign this Memorandum of Understanding in recognition of our common interests and as a token of our goodwill.

Signed:

_____	_____
For the College of South Asia Calcutta, India	For the University of Great Expectations, Washington, DC, USA

Signed on the _____ day of _____ 19_____.

Agreement between
The University of Great Expectations (U.G.E.), Washington, DC, USA
and
The University of Opportunity (U.O.), Paris, France

Aims:

The need to enhance the quality of instruction at the university level, especially for first-year students, has led the participating universities to make a study of the production and introduction of new teaching technologies (e.g., computers, video, audio).

Based on the results already obtained by both institutions, the parties to this agreement have decided to collaborate on a study of needs and new technologies and to explore the possibility of joint production of materials.

The parties will include both teaching and research units in this collaboration so that the technical tools produced will draw on expertise in both areas.

Article 1: Primary Responsibility

The collaboration will take place under the aegis of the Chancellor of U.G.E. in Washington, DC and the President of U.O. in Paris. They will ensure that the joint projects are in keeping with their own university's development plans and that funding and personnel requirements for the collaboration are met.

Article 2: Project Directors

The collaboration will be piloted by U.G.E.'s Office of Instructional Development on the one hand, and the Centre d'Enseignment on the other. Internal liaison with the Chancellor's office at U.G.E. and with the President's office at U.O. will be assured by U.G.E.'s Dean of International Studies and by the Vice President for International Affairs of U.O.

Article 3: Participants

Each institution will select participants after consultation and agreement on the academic subject areas of primary focus for the project. Selection will be made by the Office of International Studies and the Centre d'Enseignment in such a way as to ensure common lines of inquiry and to enhance the possibility of the production of multimedia tools.

The universities' scientific teams will take part in the conception and realization of these products.

Article 4: Financing

The participating universities agree to provide their own resources and to facilitate the exchange of faculty if and as necessary for the smooth operation of the project. Each institution will provide and cover the costs of four faculty full-time equivalents (FTE) for the project and will be responsible for their travel, research, and other expenses.

Article 5: Topics

Every year, a joint announcement will give details about the topics and means available for the joint project. Among the possible topics already envisioned are art history, oceanography, and geography.

Article 6: Property Rights

The rights to any material produced will be held jointly by the two institutions, with any income accruing from the sale of this material to be divided equally between the two parties.

Article 7: Duration and Notice of Revocation

The present agreement will be in force for a period of three years, beginning January 1, 1994, renewable for three additional years by mutual consent of the parties.

It may be revoked at any time, with six months' advance notice required before the beginning of each academic year.

Signed:

Chancellor, University of Great Expectations, Washington, DC, USA	President, University of Opportunity Paris, France

Signed on the _____ day of _____ 19_____.

C. SAMPLE ONE
GENERAL INSTITUTIONAL AGREEMENTS

Student Exchange Agreement between *The University of Great Expectations* and _____

1. OBJECTIVE

To promote international understanding and to enhance educational opportunities for their students, the University of Great Expectations and _____ hereby establish this agreement for the exchange of undergraduate students.

2. NUMBER OF PARTICIPANTS

The exchange shall commence with the _____ term and shall be limited in number to no more than _____ students per academic year or _____ one-semester students per year from each institution. For any year in which an imbalance in the number of participating students occurs, the universities may by mutual written consent make adjustments the following year.

3. SELECTION OF STUDENTS

The students to be sent by each institution will be selected by that institution. Each host institution determines whether the recommended students are finally admissible to that institution. Students selected for participation must have completed at least three semesters (preferably two years) of university study before beginning their studies on the exchange and must have a minimum GPA of 3.0 (4.0=A).

4. ACADEMIC PROGRAM

Exchange students will be permitted to enroll in courses or programs at the host institution for which they are qualified so long as spaces are available. They must maintain full-time student status as defined by their respective home universities. The course of study to be undertaken at the host institution must be approved by the home university of each student prior to departure.

5. STUDENT STATUS

Exchange students will be registered as "special" students and will have the same privileges and will enjoy the same medical, sports, and other amenities as other enrolled students. They will be subject to the statutes, ordinances, and regulations of the host institution.

6. APPLICATION DEADLINES

Applications from students for the academic year and fall semester must reach the host institution by February 15; for the spring semester, by October 1. Acceptance decisions will be made by April 1 for academic year and fall semester students and by November 1 for spring semester students.

7. FINANCING

Participating students from each university shall pay basic tuition and mandatory fees to their home institution and shall study at the other institution without further charges for host tuition and fees (except where courses or activities with special fees are selected). Airfare and all other personal expenses are the responsibility of individual students.

8. HOUSING

Each university shall assist participating students in finding appropriate accommodations, university or private, the cost of which shall be borne by the students.

9. HEALTH INSURANCE

Exchange students will be required to purchase health insurance especially designed for foreign students at the host institution unless they can present evidence of comparable or better coverage from their sponsoring institution.

10. STUDY PROGRAM AND CREDITS

At the end of the period of study, the host institution will forward to the sending institution a record of the courses and grades received by each exchange student.

11. OTHER

The obligations of the parties under this Agreement are only for the participants and do not include spouses or dependents.

Both institutions shall exchange regularly their college bulletins and other information relevant to courses and registration.

Exchange personnel must abide by the laws of the host country and by the rules and regulations of the host university.

This agreement becomes effective when signed by the representatives of the two universities. This agreement shall remain in effect unless either university gives a one-year written notice of intent to discontinue.

Any articles in this agreement may be amended or revised by the two universities after consultation and mutual agreement. Any such amendment or revision must be in writing and must be signed by both parties. Any issues not mentioned in this agreement shall be resolved through mutual agreement, and each party covenants that it will make good faith efforts to reach such agreement.

Signed: _____

On behalf of: _____

Date: _____

Signed: _____

On behalf of ***The University of Great Expectations***

Date: _____

C. Sample Two
General Institutional Agreements

Institutional Agreement
between
The University of Great Expectations
and

_____

Both universities agree to establish ties of friendship and cooperation for the purpose of promoting mutual understanding and possible academic, cultural, and personnel exchange.

Teaching and Research Personnel Exchange:
Both universities agree to work to facilitate opportunities for the exchange of teaching and research personnel. Exchanges may be from any branch of learning, and the duration of each stay at the host institution can range from one month to one academic year.

In the event of an exchange, each sending university will provide board, lodging, health insurance, or a stipend sufficient to cover the cost of these items to the faculty and staff that it sends to the host university during the period of the exchange. In addition, the host university will grant study and research privileges equivalent to those available to resident faculty and staff at their home institution.

Each university will be responsible for the round-trip expenses of its faculty and staff from the home institution to the host institution and return.

Each university is responsible for its own faculty and staff salaries while these individuals are participating in the exchange.

The exchange faculty and staff are expected to study and work according to their own plan for professional improvement and research. Specific arrangements for special facilities, laboratories, and the like will be agreed upon by the two universities in advance.

Graduate Student Exchange:
Both universities agree to consult on the possibilities for a graduate student exchange. Generally, each graduate student exchangee shall stay at the host university for a period of one academic year.

In the event of an exchange of graduate students, each university will submit to the host university for its approval a list of graduate student nominees, brief biographical accounts, certificates of language competency, and the planned course of study at the host university. If the graduate student nominee expects to earn degree credit at the host institution, the nominees must complete all relevant application forms and must be acceptable to the host university degree program.

In the event of an exchange of graduate students, each sending university will provide board, lodging, health insurance, tuition, and other study-related expenses of its exchangees according to the common practice of the educational establishment in each country, or a stipend sufficient to provide these items.

In the event of an exchange, each university will be responsible for the round-trip expenses of its graduate students from the home institution to the host institution and return.

Both universities will exchange information on the exchange possibilities for graduate students at least six months in advance of the beginning of the host institution's academic year.

Books and Reference Materials Exchange:
Both universities will consider developing an exchange of appropriate books and reference materials (including teaching programs, guidance materials, and the like) published by each of the two universities. Both universities will explore possibilities for exchanging books and reference materials published in their respective countries.

Other Issues:
Exchange personnel must abide by the laws of the host country and by the rules and regulations of the host university.

This agreement becomes effective when signed by the representatives of the two participating universities. This agreement shall remain in effect unless either university gives a one-year written notice of intent to discontinue.

Any provisions in this agreement may be amended or revised by the two universities after consultation and mutual agreement. Any such amendment or revision must be in writing and must be signed by both parties. Any issues not addressed in this agreement shall be resolved through mutual agreement, and each party covenants that it will make a good faith effort to reach such agreement.

Nothing in this agreement shall be construed as creating any legal or financial relationships between the parties. This agreement is to be construed merely as a statement of intent to foster the possibility of genuine and mutually beneficial academic collaboration.

Signed: _____

On behalf of: _____

Date: _____

Signed: _____

On behalf of ***The University of Great Expectations***

Date: _____

Letter of Introduction and Identification

College of Good Hope

July 4, 1993

TO WHOM IT MAY CONCERN:

Professor _____, a senior member of our faculty and Director of our Study Abroad Program, is traveling to Sierra Leone on behalf of the College of Good Hope. He will be meeting with officials at Fourah Bay College to discuss our student exchange and other cooperative efforts.

We would appreciate it if you could extend to Professor _____ the usual courtesies accorded a scholar and university representative. Our hosts during the visit are the Vice Chancellor of Fourah Bay College and the Principal of The University of Sierra Leone.

Please feel free to contact me if you have any questions. My phone number is (202) 868-1993, and my fax number is (202) 868-1994.

Sincerely,

_____

Vice President for
International Studies
and Programs
College of Good Hope

xc: President, College of Good Hope
Vice Chancellor, University of Sierra Leone
Principal, Fourah Bay College

APPENDIX II

Useful Publications

The following directories are good sources of information on associations and on government and non-governmental resources:

Economist Intelligence Unit. Order from EIU, 215 Park Avenue South, New York, NY, 10003, USA. Attn: Carl Schnedeker. (212) 460-0675. Fax: (212) 995-8837. Telex: 175567

CRE: 1993 Directory. Standing Conference of Rectors, Presidents and Vice-Chancellors of the European Universities, 1993. Annual 167 pp. Order from ACE Publications, 1 Dupont Circle, Suite 800, Washington, DC, 20036.

Guide to International Education in the United States. David Hoopes and Kathleen Hoopes, eds., 1991. 589 pp. Order from Gale Research Inc., 835 Penobscot Building, Detroit, MI 48226. Toll-free telephone (800) 347-GALE.

International Exchange Locator. A Guide to U.S. Organizations, Federal Agencies, and Congressional Committees Active in International Educational Exchange. Alliance for International and Cultural Exchange, 1993. 183 pp. Order from IIE Books, 809 United Nations Plaza, New York, NY, 10017-3580. (212) 984-5412.

Klasek, Charles B., "Inter-Institutional Cooperation Guidelines and Agreements," in *Bridges to the Future: Strategies for Internationalizing Higher Education*, Chapter 7. Association of International Education Administrators, Southern Illinois University at Carbondale.

Smuckler, Ralph H., "University International Linkages," in *International Investment in Human Capital: Overseas Education for Development*, IIE Research Report No. 24, Chapter 9. Institute of International Education, 809 United Nations Plaza, New York, NY 10017.

The following are general sources of information on universities and other institutions of higher education around the world. They are available in most libraries (or contact the publisher):

Academic Year Abroad. Institute of International Education., 1993. 482 pp. Order from IIE Books, 809 United Nations Plaza, New York, NY, 10017-3580, USA, or fax order to (212) 984-5452.

Encyclopedia of Comparative Education and National Systems of Education. T. Neville Postlethwaite, ed. Pergamon Press, NY, 1988. 777 pp.

Encyclopedia of Higher Education. Burton Clark and Guy Neave, eds. Pergamon Press, NY, Spring 1992.

European Community/United States Cooperation in Education. United States Information Agency, Bureau of Education and Cultural Affairs. Washington, DC, 1990. 529 pp. Documents on European Community programs related to education and training, such as the European Community Action Scheme for the Mobility of University Students (ERASMUS) and the Trans-European Mobility Scheme for University Studies (TEMPUS).

Handbook of World Education. A Comparative Guide to Higher Education & Educational Systems of the World. American Collegiate Service, Houston, TX, 1991, 898 pp.

Higher Education in the European Community. Student Handbook. Commission of the European Communities. Kogan Page, London, 1990. 520 pp.

International Handbook of Universities. International Association of Universities, Stockton Press, NY, 1991. 1,466 pp.

International Higher Education, An Encyclopedia. Philip Altbach, ed. Garland Publishing, Inc., 1991. 1,090 pp.

International Visitor's Guide to U.S. Higher Education. American Council on Education, Office of International Education, Washington, DC, 1990. Includes four brochures: Higher Education Associations; Governance, Administration, and Accreditation of U.S. Higher Education Institutions; Admissions, Faculty, Students, and Instruction; and Financing Higher Education in the United States.

There are also guides to higher education institutions in specific world regions. *Guide to International Education in the United States* includes information on these publications, as well as relevant periodicals, reference sources, and publishers.

Appendix III

Agencies and Associations in the United States

The United States has no central clearinghouse for information on all college and university affiliations with all institutions abroad. The groups listed are possible sources of contacts and information. Some groups can provide information on universities abroad; others can supply lists of area studies centers among their membership or names of member institutions with linkages abroad. The list includes groups specific to a geographic region, national offices of the major higher education associations, and organizations focused primarily on international education and exchange.

African-American Institute (AAI)
833 United Nations Plaza
New York, NY 10017
(212) 350-2903; (212) 682-6174 (fax)
(Information on African Colleges and Universities)
Contact: Yolande Zahler

American-Mideast Educational and Training Services, Inc (AMIDEAST)
Division of Education and Training Programs
1100 17th Street, NW, Suite 300
Washington, DC 20036
(202) 293-9161; (202) 872-8857 (fax)
Contact: Kate Archambeault

American Association of Community Colleges (AACC)
Director, International Services
One Dupont Circle, NW, Suite 410
Washington, DC 20036
(202) 728-0200; (202) 833-2467 (fax)
Contact: James McKenney

American Association of State Colleges and Universities (AASCU)
One Dupont Circle, NW, Suite 700
Washington, DC 20036
(202) 293-7070; (202) 296-5819 (fax)
Contact: Mathilda Harris

American Association of Teachers of German (AATG)
112 Haddontowne Court #104
Cherry Hill, NJ 08034
(609) 795-5553; (609) 795-9398 (fax)
Contact: Helene Zimmer-Loew

American Association of Teachers of Slavic and East European Languages
Arizona State University
Foreign Languages Department
Tempe, Arizona 85287
(602) 965-6394
Contact: Sanford Couch

American Council on Education (ACE)
Director of International Education
One Dupont Circle, Suite 800
Washington, DC 20036
(202) 939-9313; (202) 833-4760 (fax)
Contact: Barbara Turlington

American-Scandinavian Foundation
725 Park Avenue
New York, NY 10021
(212) 879-9779; (212) 249-3444 (fax)
Contact: Jean Prahl

Association of American Universities (AAU)
One Dupont Circle, Suite 730
Washington, DC 20036
(202) 466-5030; (202) 775-9242 (fax)
Contact: John Vaughn

Asia Foundation
P.O. Box 3223
San Francisco, CA 94119
(415) 982-4640; (415) 392-8863 (fax)
Contact: Public Affairs Department

Association of Catholic Colleges and Universities (ACCU)
One Dupont Circle, NW, Suite 650
Washington, DC 20036
(202) 457-0650; (202) 728-0977 (fax)
Contact: Paul Gallagher

Association of Jesuit Colleges and Universities (AJCU)
One Dupont Circle, NW, Suite 405
Washington, DC 20036
(202) 862-9893; (202) 862-8523 (fax)
Contact: Joseph Kane

The College Board
Office of International Education
1717 Massachusetts Avenue, NW, Suite 402
Washington, DC 20036
(202) 332-1480; (202) 234-9806 (fax)
Contact: John Deupree

Citizen's Democracy Corps
2021 K Street, NW, Suite 215
Washington, DC 20006
(202) 872-0933; (202) 872-0923 (fax)
(Information on Eastern and Central Europe)
Contact: Tom Foggin

Also, offices in the Czech Republic:
Staromesteske Nam.
6, 320/1
P.O. Box 27
11000 Prague
Czech Republic 1

Hungary:
Ostrom u. 23-25, #111
H-1015
Budapest, Hungary

Consortium for International Development (CID)
6367 East Tanque Verde, Suite 200
Tucson, AZ 85715
(602) 885-0055; (602) 886-3244 (fax)
(A group of U.S. universities involved mainly in Third World development projects)

Council for European Studies
Columbia University
Box 44 Schermerhorn
New York, NY 10027
(212) 854-4172; (212) 749-0397 (fax)
Contact: Ioannnis Sinanoglou

Institute of International Education (IIE)
809 United Nations Plaza
New York, NY 10017
(212) 883-8200; (212) 984-5452 (fax)
Contact: Information Services

International Research and Exchanges Board (IREX)
1616 H St., NW
Washington, DC 20006
(202) 628-8188; (202) 628-8189 (fax)
(Information on the Baltics and the Commonwealth of Independent States)

Latin American Scholarship Program of American Universities (LASPAU)
25 Mount Auburn Street
Cambridge, MA 02138
(617) 495-5255; (617) 495-8990 (fax)
Contact: Lewis Tyler

Latin American Studies Association
University of Pittsburgh
William Pitt Union, Room 946
Pittsburgh, PA 15260
(412) 648-7929; (412) 624-7145 (fax)
Contact: Reid Reading

MidAmerica International Agricultural Consortium (MIAC)
University of Nebraska
14 Varner Hall - UN, 3835 Holdrege
Lincoln, NB 68583
(402) 472-3900; (402) 472-3901 (fax)
(A group of U.S. universities involved mainly in Third World development projects)
Contact: William Miller

Midwest Universities Consortium for International Activities (MUCIA)
Ohio State University
66 East 15th Avenue
Columbus, OH 43201
(614) 291-9646; (614) 291-9717 (fax)
(A group of U.S. universities involved in international projects, including Third World development projects)
Contact: William Flinn, Executive Director

NAFSA: Association of International Educators
1875 Connecticut Avenue, NW, Suite 1000
Washington, DC 20009
(202) 462-4811; (202) 667-3419 (fax)
Contact: William Vinal

National Association of Independent Colleges and Universities (NAICU)
122 C Street, NW, Suite 750
Washington, DC 20001
(202) 347-7512; (202) 628-2513 (fax)
Contact: Frank Balz

National Association of State Universities and Land Grant Colleges (NASULGC)
One Dupont Circle, Suite 710
Washington, DC 20036
(202) 778-0818; (202) 296-6456 (fax)
Contact: Virginia Hammell

Northeast Consortium for International Development (NECID)
University of Maine
100 Winslow Hall
Orono, ME 04469
(207) 581-2905; (207) 581-2920 (fax)
(A group of U.S. universities involved primarily in Third World development projects)

Partners of the Americas
University Linkages Program
1424 K Street, NW, Suite 700
Washington, DC 20005
(202) 628-3300; (202) 628-3306 (fax)
Contact: Tanya George, Vice President for Programs

Southeast Consortium for International Development (SECID)
1511 K Street, NW, Suite 319
Washington, DC 20005
(202) 628-4551; (202) 628-4561 (fax)
(A group of U.S. universities involved primarily in Third World project development)

APPENDIX IV

U.S. GOVERNMENT RESOURCES

The U.S. Agency for International Development (AID) Center for University Cooperation in Development administers the "University Development Linkages Project." The project's purpose is to promote and support the collaboration of U.S. colleges and universities with higher education institutions in developing countries. The project is open to all U.S. public and private universities in all sectors of international development of interest to AID. The awards are made annually on a competitive basis. Targeted countries change each year. For more information, contact the Center for University Cooperation in Development, AID, Washington, DC 20523-0278. (703) 816-0291; (703) 816-0266 (fax). Contact: Dr. William Miner.

The U.S. Department of Education's Center for International Education (CIE) manages a number of funding programs in support of international education. Among these is funding for the National Resource Centers, which focus on one world region or on general worldwide topics. For more information, contact CIE, U.S. Department of Education, 400 Maryland Avenue, SW, Washington, DC 20202. (202) 708-9298; (202) 708-6268 (fax). Also of interest at the Department of Education is the Fund for the Improvement of Post-Secondary Education. (202) 708-5750.

The U.S. Information Agency's (USIA) University Affiliations Program seeks to expand bilateral institutional relationships between U.S. and foreign colleges in the fields of humanities, social sciences, education, and communications. The program helps institutions initiate new affiliations and strengthen existing ones. Participation in the annual competitive grants program is limited to accredited U.S. four-year colleges and universities. Each year's competition is limited to projects involving certain countries or geographical regions. For more information, contact the University Affiliations Program, Office of Academic Programs, USIA, 301 4th Street, SW, Washington, DC 20547. (202) 619-5289; (202) 554-0836 (fax).

In addition, Country Officers at the U.S. Department of State in Washington, DC can provide information on higher education institutions in specific countries.

APPENDIX V

BI-NATIONAL EDUCATIONAL FOUNDATIONS AND COMMISSIONS

The offices listed below are resources for information on higher education institutions abroad. In addition, information on higher education in specific countries is available from the Cultural Affairs officer or staff at that country's embassy in Washington, DC. (These institutions are listed under "Embassy" in the white pages.)

OTHER ORGANIZATIONS

International Association of Universities (IAU)
1 rue Miollis
75732 Paris Cedex 15
France
Telephone: 568-25-45

United Nations Educational, Scientific and Cultural Organization (UNESCO)
7 Place de Fontenoy
75700 Paris
France
Telephone: 577-16-10

Fulbright Commission
301 4th St., SW
Washington, DC 20547
Telephone: (202) 619-4700
Contact: Request information regarding the capital city of the country you are visiting to see if there is an office. In recent years there have been offices in the following countries: Argentina, Australia, Austria, Belgium and Luxembourg, Brazil, Canada, Chile, Colombia, Cyprus, Denmark, Ecuador, Egypt, Finland, France, Germany, Greece, Iceland, India, Ireland, Israel, Italy, Japan, Korea, Liberia, Malaysia, Mexico, Morocco, Nepal, Netherlands, New Zealand, Norway, Pakistan, Peru, The Philippines, Portugal, Spain, Sri Lanka, Sweden, Taiwan, Thailand, Turkey, United Kingdom, Uruguay, and Yugoslavia.

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National Association of State
Universities and Land-Grant
Colleges

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Ex officio for one-year terms:
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Philip Y. Hahn School of Nursing,
University of San Diego (CA)
American Association of Colleges
of Nursing

Donald Stewart, President
The College Board
The College Board

Phillip M. Grier, Executive Director
National Association of College
and University Attorneys
Washington Higher Education
Secretariat

AMERICAN
COUNCIL ON
EDUCATION

BEST COPY AVAILABLE